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FOREIGN CROPS and MARKETS

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LATE FOREIGN DEVELOPMENTS

EGYPT: The Government has lifted previous restrictions against the sale of wheat, corn, and flour in the free market, according to the press, provided the prices fixed for these products are observed. The prohibition against the transport of cereals, poultry, and eggs from one district to another by private individuals is also reported to have been rescinded.

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IRELAND: The Irish Revenue Commissioners have issued an order temporarily suspending the requirement that importers obtain a license for the importation of manufactured tobacco, cigars, cigarettes, and snuff into Ireland. The order is effective January 1 to June 30, 1942, inclusive, and was promulgated under the Emergency Power Act of 1939.

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G R A I N SURUGUAY EXPECTS INCREASED
GRAIN PRODUCTION . . .

The 1941-42 grain crops of Uruguay were favored by good weather conditions, and marked increases over the poor crops of 1940-41 seem assured, according to information received in the Office of Foreign Agricultural Relations. The corn crop, which was seeded last fall, received considerable rain in the early part of the growing season. Dry weather in late December and in January was finally broken by gentle showers, and the fields were reported early in February to be in good shape. Yields appear likely to prove higher this season from acreages which, for several grains, were larger than those seeded for 1940-41. Consequently, Uruguay will probably require little foreign grain during 1942.

URUGUAY: Acreage and production of grains, average
1935-36 to 1939-40, annual 1940-41 to 1941-42

Year	Wheat	Oats	Barley	Corn
	1,000	1,000	1,000	1,000
<u>Acreage</u>	<u>acres</u>	<u>acres</u>	<u>acres</u>	<u>acres</u>
1935-36	1,267	205	34	600
1936-37	986	179	28	531
1937-38	1,375	221	31	529
1938-39	1,256	246	41	541
1939-40	1,165	215	45	517
Average	1,210	213	36	544
1940-41	926	225	55	607
1941-42	1,038	208	72	568
	1,000	1,000	1,000	1,000
<u>Production</u>	<u>bushels</u>	<u>bushels</u>	<u>bushels</u>	<u>bushels</u>
1935-36	15,096	3,821	600	6,367
1936-37	9,246	1,999	309	4,879
1937-38	13,571	3,328	517	5,227
1938-39	15,461	3,586	638	6,247
1939-40	9,901	2,764	631	5,008
Average	13,255	3,100	539	5,546
1940-41	6,934	1,309	450	5,179
1941-42	11,758	-	-	-

Compiled from official statistics and reports from the American Consulate, Montevideo.

The wheat acreage was unofficially estimated at 1,038,000 acres as compared with 926,000 in the previous season, and the outturn was

estimated at nearly 12 million bushels as against less than 7 million in 1940-41. Although the current harvest was placed somewhat below the average annual outturn during 1935-36 to 1939-40 of 13.3 million, it is expected to cover domestic requirements, which usually range from 11 to 12 million bushels. Because of the poor crop of 1940-41, it was necessary to import during 1941, and it was reported that about 4 million bushels of Argentine wheat entered the country.

A minimum basic price of 7.50 pesos per quintal (\$1.07 per bushel) has been established for wheat of the 1941-42 crop, with an increase of 10 centesimos every 2 months up to 8.00 pesos (\$1.15 per bushel). The price proposed to the General Assembly late in November 1941 set the basic price at 5.80 pesos (83 cents per bushel) with increases of 5 centesimos every 2 months up to 6.05 pesos (87 cents per bushel). Considerable dissatisfaction resulted, and the basic rate was raised to 7.50 pesos but was vetoed by the Executive Power, with the explanation that such a price would of necessity increase the price of bread. The Assembly, however, overrode the veto and the higher price went into effect, causing considerable confusion in the grain market, according to the press.

In the original proposal, the basic price was applied to wheat of good quality, delivered at Montevideo to the official granaries or other storage warehouses designed by the Bank of the Republic. Prices at other points were to be based on Montevideo prices, less cost of transportation. The Bank was authorized not only to purchase wheat at the price set but to import if necessary for the manufacture of flour. Millers were required, when purchasing wheat, to give preference to domestic grain and to keep records of all purchases.

The production of corn in Uruguay is second in importance to that of wheat. No estimates have yet been made of the 1941-42 crop, but about the same acreage was planted as in the previous season. The 1940-41 crop, however, was not only small but of such poor quality that much of it was not suitable for ordinary consumption. More than half a million bushels were therefore imported from Argentina in order to meet domestic needs.

The acreage seeded to oats was reduced from the 225,000 acres reported in 1940-41 to only 208,000 acres, but because of the improvement in growing conditions, a larger crop is reported to have been obtained in the current season than the 1.3 million bushels reported for 1940-41, although no definite estimate was available. About 550,000 bushels were imported from Argentina last year, but it is hoped that domestic production will cover a larger part of home requirements during 1942.

About 72,000 acres were seeded to barley for the 1941-42 crop. The increase of 31 percent over the previous year was attributed to the larger area sown to malting varieties. If final crop returns come

up to expectations, no imports will be necessary this year, since last year's import requirements amounted to only 46,000 bushels.

ALGERIAN WHEAT CROP
REVISED UPWARD . . .

The 1941 wheat crop of Algeria appears to have been somewhat better than anticipated and nearly 5 million bushels larger than the 1940 estimate, according to an unofficial report received in the Office of Foreign Agricultural Relations. The outturn of bread wheat was revised upward and that of durum downward to give a total of 32,334,000 bushels instead of slightly less than 32,000,000 bushels as previously reported. From the estimated surplus available for export during 1941-42 of about 6 million bushels, at least 5.5 million had been shipped by the end of 1941, it was stated.

The 1941-42 season is reported to have been characterized so far by the tenacity with which native farmers have held their wheat. In spite of premiums for early delivery and high official prices, it has been difficult for the Government to secure enough wheat to carry out its plans for domestic distribution.

Prospects for the 1942 crop are reported to be favorable, but no estimates are yet available. The lack of gas and oil with which to run farm machinery is expected to result in curtailed seedings on the large farms, and the 1942 acreage will probably be reduced from that of 1941.

INDIA HARVESTS LARGE RICE CROP . . .

The 1941-42 Indian rice harvest amounted to 1,911 million bushels as compared with 1,655 million last year, according to official estimates just received from Calcutta. Current production, the largest in the past 4 years, is the result of increased acreage and favorable weather, especially while the crop was maturing. The greatest increase in acreage this season was in the Province of Bengal, the most important rice-producing area of India. In Bengal rice replaced a substantial amount of jute acreage, which was reduced because of the poor export outlook for this commodity. Furthermore, official efforts have been made to increase rice acreage in order to make India more nearly self-sufficient.

India, the world's second largest rice producer, has usually been the world's largest rice importer. During the past 5 years, imports have averaged 3 billion pounds annually. More than 80 percent of the imported requirements have been from Burma, with the remainder obtained from Thailand and Indochina. Due to the short Indian harvest last year,

it was expected that imports during 1941 would be at a high level. Imports in 1941, however, were much below expectations on account of the unusual demand for Burman rice. Burma's exportable surplus for 1941 was estimated at about 7 billion pounds. The large exports to Japan, British Malaya, the United Kingdom, and other British possessions resulted in a marked increase in prices at Rangoon and decreased shipments to India. With the invasion of Burma at the present time, it is likely that India will be able to obtain very little rice from this source in 1942. In fact, in addition to the necessity of being self-sufficient, it may be necessary for India to supply Ceylon with rice, as this island has formerly depended to a very large extent on imports from Burma.

INDIA: Rice production, imports, exports, and apparent utilization, 1934-35 to 1941-42 a/

Year	Production	Imports <u>b/</u>	Exports <u>b/</u>	Apparent utilization <u>b/</u>
	Million pounds	Million pounds	Million pounds	Million pounds
1934-35 ...	57,611	<u>c/</u>	<u>6/</u>	<u>c/</u>
1935-36 ...	51,988	<u>c/</u>	<u>c/</u>	<u>c/</u>
1936-37 ...	62,326	2,211	1,599	62,938
1937-38 ...	59,806	2,564	637	61,733
1938-39 ...	53,691	4,977	663	58,005
1939-40 ...	56,815	<u>d/</u> 3,600	542	-
1940-41 ...	49,616	<u>d/</u> 2,700	-	-
1941-42 ...	57,270	-	-	-

Compiled from official sources.

a/ In terms of milled rice. b/ For the calendar year following harvest.
c/ Data not available for India excluding Burma. d/ Estimates based on exports from Burma.

INDIA: Rice acreage and production, 1941-42, with comparisons

Year	Acreage	Production
	Thousand acres	Million bushels
Average 1931-32 to 1935-36	70,555	1,938
1936-37	72,295	2,080
1937-38	72,568	1,996
1938-39	73,398	1,791
1939-40	73,199	1,896
1940-41	72,216	1,655
1941-42	73,165	1,911

Compiled from official sources.

V E G E T A B L E O I L S A N D O I L S E E D SCUBAN VEGETABLE-OIL IMPORTS
CONTINUE TO INCREASE . . .

Cuban imports of vegetable oils in 1941 were 19 percent above the previous year. Cottonseed oil showed the greatest increase, especially during the first 6 months of the year when the price of hog lard was much higher than that of substitutes. Later in the year this condition was reversed, and imports of hog lard for the entire year exceeded those of 1940 by 11 million pounds and were the highest since 1929.

Imports of olive oil were negligible, and consumption is on a greatly restricted basis compared with the years prior to 1939, as sources of supply have been greatly reduced since the outbreak of the war in Europe. Most of the sales are in small quantities at prices far above the reach of the average person. Olive oil has been replaced to some extent by less expensive imported oils and domestic peanut oil. Unofficial but reliable sources estimate that the Cuban output of peanut oil in 1941-42 may be from 11 to 15 million pounds.

CUBA: Imports of vegetable oils, 1939-1941

Kind of oil	1939	1940	1941
	1,000 pounds	1,000 pounds	1,000 pounds
Cottonseed oil -			
Crude	0	0	364
Refined	125	128	257
Hydrogenated	367	294	280
Coconut oil-			
Crude	2,370	257	402
Refined	1,471	962	1,215
Hydrogenated	266	301	466
Peanut oil -			
Crude	0	62	120
Refined	75	16	20
Hydrogenated	0	61	0
Soybean oil -			
Crude	8,741	5,085	5,375
Refined	1,979	1,051	1,283
Total	15,394	8,217	9,782

American Consulate, Habana.

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C O T T O N - O T H E R F I B E R S

SAO PAULO COTTON CROP ABOUT EQUAL
TO LAST YEAR'S RECORD . . .

Private estimates of the 1941-42 cotton crop in São Paulo Brazil, range from 1,614,000 to 1,753,000 bales (of 478 pounds) compared with the latest official estimate of 1,799,000 bales for 1940-41. Estimates of the current crop are based on crop conditions at the end of January, about one month before picking begins. The other States in Southern Brazil usually account for an additional 100,000 bales. Adding the second official 1941-42 estimate of 510,000 bales for Northern Brazil it appears that the total for all Brazil will be about 250,000 bales less than the 1940-41 estimate of 2,557,000 bales. Current reports point out, however, that classification of last year's crop in São Paulo is virtually completed, showing a total of about 1,753,000 bales instead of 1,799,000 bales as shown in the latest official estimate released on August 19, 1941.

Heavy rains in the State of São Paulo have caused increased insect damage in many areas and the crop is generally described as spotty. Some sections are in excellent condition, while others are almost entirely ruined by pests and diseases. Carry-over in São Paulo at the end of the season (February 28) was estimated unofficially at 738,000 bales most of which is of inferior grades and will be difficult to dispose of. There have been some proposals to process this cotton for the purpose of exporting it to the United States to be used as linters in the manufacture of explosives.

Shipments of cotton from Northern to Southern Brazil, according to private sources, amounted to 22,000 bales in November and 22,000 in December, bringing the total for the last 5 months of 1941 to 115,000 bales compared with 92,000 for the corresponding period in 1940. Exports from Northern Brazil during this period in 1941 amounted to 38,000 bales against 62,000 in 1940 (August-December).

Cotton mills in both Northern and Southern Brazil are operating at capacity. Increased activity in northern mills is attributed largely to production of textiles to fill orders from the East Indies and to shipments of cotton yarns to other Latin American countries since the recent lifting of the export ban. It is believed that all Brazilian mills will operate at capacity for the duration of the war, as textile exports to Latin American countries are increasing.

Preliminary reports show that Brazil's cotton exports during recent months have declined sharply from 163,000 bales in August and 142,000 in September, to 46,000 in October, 103,000 in November, 14,000 in December, and 52,000 in January. The preliminary export total of 519,000 bales for the 5 months is considerably less than the total of 598,000 bales exported during the same period last season. The sale of

46,000 bales for export to Sweden under British navicert represented only a fraction of the original inquiry from Sweden. Shipments to Canada have been delayed by lack of sufficient shipping facilities.

BRAZIL: Cotton exports by countries of destination,
August-January 1941-42, with comparisons
(In bales of 478 pounds net)

Country	1938-39	1939-40	1940-41	August-January a/	
				1940-41	1941-42
	1,000	1,000	1,000	1,000	1,000
	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>	<u>bales</u>
United Kingdom	229	295	106	78	139
Germany	333	70	10	0	0
Japan	406	219	387	197	17
China	214	153	191	81	48
Canada	1	20	290	111	80
United States	5	11	b/ 154	b/ 21	b/ 151
Sweden	13	2	26	26	29
Portugal	14	52	15	5	23
Spain	11	3	83	65	0
Colombia	c/	3	39	5	21
Others	378	143	52	9	11
Total	1,609	981	1,333	598	519

Compiled from official sources and trade reports.

a/ Preliminary. b/ Mostly for transshipment to Canada. c/ Less than 500 bales.

Spot prices of São Paulo type-5 cotton advanced steadily from 45 milreis per arroba (7.36 cents per pound) on January 2 to 50.5 milreis (8.26 cents) on January 31. The increase was attributed partly to stronger inquiries from the United Kingdom and Sweden, although largely influenced by increases in prices of American cotton.

UGANDA COTTON CROP SLIGHTLY HIGHER . . .

The 1941-42 cotton crop in Uganda, picked during November to March, is unofficially estimated at 305,000 bales (of 478 pounds) compared with 272,000 last year and 252,000 in 1939-40. Corresponding estimates of planted areas made by the Uganda Department of Agriculture were 1,298,000, 1,284,000, and 1,268,000 acres, respectively, for the three years. Excessive rains early in the season caused heavy damage to young cotton plants but favorable weather during the remainder of the growing period were expected to permit a yield at least as good as that in 1940-41. Blackarm disease, however, was causing more than normal damage at the time of this report early in January.

Uganda cotton is derived from American Upland seed and competes successfully with American cotton in export markets, particularly the British Empire. No export data are available at present. Most of the crop presumably is being purchased by spinners in India and the United Kingdom, as in recent years.

GERMANY INCREASES FLAX ACREAGE . . .

In the past 6 or 7 years the area devoted to flax production in Germany has shown rapid expansion, increasing from less than 25,000 acres in 1934 to almost ten times that figure for 1941. Information received in the Office of Foreign Agricultural Relations indicates that the present volume of fiber production would account for 75 percent of Germany's pre-war requirements, whereas formerly it was necessary to supply 75 percent of the country's needs by imports.

Special attention is being given to the continued cultivation of flax in Poland, the Baltic States, and parts of Russia now under German occupation. Encouragement to German flax growers is being offered by the Government both in the form of fixed prices and in subsidies paid for the production of flax straw and linseed. Except for small quantities needed for flax sowings and home oil requirements, farmers are required to deliver all linseed to designated purchasing agents.

ALGERIA RENEWS CULTIVATION OF CHINA GRASS . . .

Ramie, sometimes referred to in commerce as China grass, has been widely grown experimentally in North Africa. In Algeria several attempts have been made to extend its cultivation for commercial purposes but without success. Now that the war has interfered with the normal trade for textile fibers in Algeria, attention is once again being given to the production of ramie.

Ramie presents difficulty in the treatment of the stems of the plant in order to obtain its fiber. This work is done by hand operation in China. A report received in the Office of Foreign Agricultural Relations states that a new machine has been tried at one of the Government stations that is able to decorticate the stems, producing a fiber of good quality. It is stated that planting of ramie is to be undertaken on a commercial scale as a result of the successful experiments with the new machine.

T O B A C C O

MEXICO REDUCES TOBACCO CROPS . . .

It is estimated that the 1941 tobacco crop of Mexico amounted to approximately 39.7 million pounds, a decrease of about 25 percent, as compared with the previous year. A heavy reduction in the crop took place in Yucatán, but in the States of Vera Cruz, Oaxaca, and Chiapas, production was about up to the high level of 1940. Planting of the 1942 crop was completed in January, but it is too early to forecast the results; however, a further reduction is indicated, both from smaller plantings and the attitude of the industry. Recent efforts of the larger manufacturers and financing groups have been directed toward cutting the crop even below that of last year.

One of the best reasons advanced for this step is the fact that tobacco stocks in Mexico are still large as compared with normal. The small factories have relatively little tobacco, but large manufacturers are well supplied. It is believed that for the industry as a whole, present supplies are sufficient for at least 26 months' continuous operation. Moreover, tobacco consumption in Mexico is not increasing rapidly enough to justify large domestic crops, and there is no export market of importance for Mexican leaf. Consumption of leaf tobacco in manufacture during the past 3 years averaged approximately 38.5 million pounds, an increase of less than 2 percent as compared with 1937-38. Mexican leaf consumption consists almost entirely of leaf produced in Mexico. Imported leaf, on the average, supplies less than 1 percent of the total requirement.

The output of tobacco products in 1940-41 totaled about 36 million pounds, or slightly less than that of the year before. Despite increased industrial activity, cigarette consumption has not appreciably increased and, if anything, a slight decline may set in. Pipes have remained fairly constant compared with rising food prices, and consumption of cigarette brands in the lower price brackets has fallen off a little. Sales of the higher-priced brands have increased somewhat.

Manufacturers are experiencing difficulty in obtaining packaging materials. Economies are being effected wherever possible, but the outlook is not bright. Changes in prices of packaged cigarettes are difficult to effect, as taxes are rated on the sales price, and any price increase is likely to throw the brand into a higher tax bracket - a process which would either absorb most of the increase in the form of taxes or sharply affect consumption. Increasing costs have been reflected in the total value of output, although volume of production has not changed substantially. Total value of the output of all tobacco products during the fiscal year 1940-41 increased 5 percent over the previous year, whereas the weight actually decreased.

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F R U I T S, V E G E T A B L E S, A N D N U T S

CHILEAN MELON CROP

ESTIMATED AT 300,000 BOXES . . .

The 1941-42 Chilean melon crop is estimated to total 300,000 boxes (averaging 36.3759 pounds per box), according to recent reports to the Office of Foreign Agricultural Relations. These melons are largely of the honeydew type, the seed for which was imported from the United States. To date weather has been mild in the important melon-producing regions and there has been abundant rainfall, with the result that the melon crop is indicated to be relatively large. Although there has been little insect damage reported, it is indicated that "stem-end rot" is causing some damage and may result in a slight reduction in the supply available for export.

Approximately 50 percent of the total crop is estimated to be available for export, but because of market conditions and shipping difficulties, the quantity actually exported is likely to range between 100,000 and 120,000 boxes. The Ministry of Agriculture, in conjunction with the Agricultural Export Board and the Under Secretary of Commerce, has established a quota of 140,000 boxes as a maximum quantity of melons that may be shipped to New York. Allotments have been made by the Chilean authorities, however, for the shipment of a maximum of 120,000 boxes during the period December through April. During recent years exports of Chilean honeydew melons to the United States have been on a declining trend, largely because of transportation difficulties, the unfavorable market situation, and adverse weather conditions resulting in small crops.

HONEYDEW MELONS: Comparisons of quotas authorized and actual shipments from Chile to New York, 1933-34 to 1941-42

Year	Quota	Actually exported to New York
	<u>Boxes</u>	<u>Boxes</u>
1933-34	-	175,393
1934-35	150,000	151,553
1935-36	170,000	128,604
1936-37	166,000	129,792
1937-38	170,000	100,032
1938-39	167,000	122,000
1939-40	167,000	107,128
1940-41	114,300	98,367
1941-42	140,000	a/ 120,000

American Consulate General, Santiago, Chile.

a/ Estimated.

FIRST ESTIMATE OF AREA PLANTED TO POTATOES IN ARGENTINA . . .

The acreage planted to potatoes for the crop year 1941-42 is indicated to total 580,000 acres compared with 597,000 acres planted last year, 514,000 in 1939-40, and an average of 411,000 acres for the 5 years, 1936-37 to 1940-41. The decrease this season is due principally to a reduction in the first plantings in the Province of Santa Fé occasioned by drought and relatively high seed prices. In the Province of Buenos Aires, where plantings are made somewhat later, sufficient seed was available to provide for increased plantings over those of a year ago, and these increases offset to some extent the smaller plantings in the Province of Santa Fé. The acreage by Provinces is as follows: Buenos Aires 235,000, Santa Fé 222,000, Mendoza and San Juan 55,000, Salta and Jujuy 21,000, Tucuman 9,000, Rio Negro and Neuquen 18,000, others 20,000 acres.

MEXICAN BEAN CROP INCREASES . . .

The production of dry edible beans in Mexico during 1941 is indicated to have totaled 3,071,000 bags (of 100 pounds), or 30 percent above the relatively short crop produced in 1940. Because of excessive rains during the harvest period, quality is considered under normal, but it is indicated that substantial supplies are available for domestic use and for export. The Mexican Government has authorized the exportation of 551,000 bags. Most of these exports probably will move to the United States, with minor quantities going to Cuba.

MEXICO: Acreage, production, and foreign trade in dry beans, 1934-1941

Year	Acreage	Production	Exports	Imports
	<u>1,000 acres</u>	<u>1,000 bags</u>	<u>1,000 bags</u>	<u>1,000 bags</u>
1934	1,475	2,729	270	1
1935	1,403	2,667	122	4
1936	1,304	2,342	21	1
1937	1,352	2,288	31	1
1938	1,474	2,326	1	7
1939	1,562	3,267	1	81
1940	1,570	2,132	8	<u>a/</u>
1941	<u>b/</u> 1,618	3,071	-	-

American Consulate, Mexico, D. F.

a/ Less than 500 bags. b/ Preliminary estimate.

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